

## AMENDMENTS TO THE CLAIMS

This listing of claims will replace all prior versions, and listings, of claims in the application:

### Listing of Claims:

1           1.       (Currently amended) An apparatus for determining taxes that is  
2       configurable for local jurisdictions, comprising:  
3           a tax knowledge base, embodied in a computer system, wherein the tax  
4       knowledge base includes tax ~~rate~~ data pertaining to ~~taxes~~ tax rates in local  
5       jurisdictions;  
6           an external tax service interface, embodied in ~~a computer~~ the computer  
7       system, configured to interface to a third party tax service provider to perform tax  
8       computations for another local jurisdiction which is simultaneously applicable;  
9           a tax rule base, embodied in ~~a computer~~ the computer system,  
10       wherein the tax rule base includes one or more tax rules for  
11       applying taxes in local jurisdictions, ~~and wherein the tax rule base is~~  
12       ~~configured to receive tax rules and data in a markup language format or an~~  
13       ~~electronic data interchange format, thus enabling a third party provider, a~~  
14       ~~tax professional, or an end user to enter the tax rules and data in a machine~~  
15       ~~readable format without requiring programming; and~~  
16           wherein the tax rules and the tax data comprise ~~at least a country~~  
17       ~~name, a tax regime identifier, a tax identifier, a tax type identifier, and a~~  
18       ~~tax jurisdiction identifier~~ tax jurisdiction; and  
19           a tax determination manager, embodied in ~~a computer~~ the computer  
20       system, ~~that is configured to determine a tax for a transaction an applicable tax~~  
21       corresponding to at least the tax regime and the tax jurisdiction at a given level of

22 granularity, a taxable basis for the applicable tax, and a tax status for the  
23 applicable tax using the tax knowledge base and the tax rule base.

1           2.       (Original) The apparatus of claim 1, further comprising a tax rules  
2 navigator that is used by the tax determination manager to navigate through rules  
3 to return the result or reference to a result for a tax determination process.

1           3.       (Previously presented) The apparatus of claim 1, further  
2 comprising a tax rules navigator that can be used by processes of a given tax  
3 service component, including the tax determination manager and a tax  
4 administration manager.

1           4.       (Original) The apparatus of claim 1, further comprising a tax  
2 services request manager that is configured to access the tax determination  
3 manager upon receiving a tax request from a registered subscriber.

1           5.       (Original) The apparatus of claim 4, further comprising an open  
2 subscription mechanism, wherein the open subscription mechanism includes  
3 security and access protocols used by the tax services request manager to control  
4 access to the tax determination manager.

1           6.       (Original) The apparatus of claim 1, further comprising a record  
2 repository, wherein the record repository stores information relating to tax events  
3 and tax status.

1           7.       (Original) The apparatus of claim 6, further comprising a tax  
2 repository manager, wherein the tax repository manager is configured to store and  
3 retrieve tax events and tax status to and from the record repository.

1           8.       (Original) The apparatus of claim 1, further comprising a tax  
2 configuration manager, wherein the tax configuration manager is configured to  
3 update the tax knowledge base and the tax rule base.

1           9.       (Original) The apparatus of claim 1, further comprising a  
2 geographical model, wherein the geographical model is used to configure the  
3 geographical boundaries of various jurisdictions associated with different tax  
4 regimes.

1           10.      (Original) The apparatus of claim 1, further comprising a trading  
2 community model, wherein the trading community model represents various  
3 parties, sites and locations involved in tax operations in a standardized format.

1           11.      (Original) The apparatus of claim 1, further comprising a tax  
2 administration manager, wherein the tax administration manager determines the  
3 recoverability and the extent of recovery of a tax.

1           12.      (Previously presented) The apparatus of claim 1, further  
2 comprising a tax administration manager, wherein the tax administration manager  
3 determines an amount to be settled with a tax authority for a given tax and a  
4 calendar period specified by the tax authority.

1           13.      (Previously presented) The apparatus of claim 1, further  
2 comprising a tax administration manager, wherein the tax administration manager  
3 interfaces with a payables system to enable the payment of a settlement amount  
4 determined by another process of the tax administration manager.

1           14.     (Previously presented) The apparatus of claim 1, further  
2     comprising a tax administration manager, wherein the tax administration manager  
3     provides a facility for reconciling the amounts in a record repository with that  
4     existing in an accounting system.

1           15.     (Currently amended) A method for determining taxes for local  
2     jurisdictions, comprising  
3             receiving a request to provide a tax for a transaction from a subscriber;  
4             determining a ~~set of local jurisdictions~~ local jurisdiction for the transaction;  
5             accessing a tax rule base and a tax knowledge base,  
6             wherein the tax rule base includes one or more tax rules for  
7             applying taxes in local jurisdictions, and the tax knowledge base includes  
8             tax data pertaining to tax rates in local jurisdictions, is configured to  
9             receive tax rules and data in a markup language format or an electronic  
10            data interchange format, thus enabling a third party provider, a tax  
11            professional, or an end user to enter the tax rules and data in a machine  
12            readable format without requiring programming; and  
13            wherein the tax rules and the tax data comprise at least a country  
14            name, a tax regime identifier, a tax identifier, a tax type identifier, and a  
15            tax-jurisdiction identifier tax jurisdiction;  
16            calculating the tax for each ~~the local jurisdiction in the set of local~~  
17     jurisdictions using the one or more tax rules from the tax rule base and the tax rate  
18     data from the tax knowledge base, wherein calculating the tax involves  
19     determining an applicable tax corresponding to at least the tax regime and the tax  
20     jurisdiction at a given level of granularity, a taxable basis for the applicable tax,  
21     and a tax status for the applicable tax;

22 using a third party service external to the system to perform tax  
23 computations for another local jurisdiction which is simultaneously applicable;  
24 and  
25 returning the tax for ~~each~~ the local jurisdiction to the subscriber.

1 16. (Original) The method of claim 15, further comprising:  
2 determining a taxable basis from the transaction;  
3 determining a tax status basis from the tax rule base;  
4 determining a tax rate from the tax knowledge base; and  
5 calculating the tax based on the taxable basis, the tax status basis, and the  
6 tax rate.

1 17. (Original) The method of claim 15, wherein receiving the request  
2 from the subscriber includes verifying that the subscriber is authorized to make  
3 the request.

1 18. (Original) The method of claim 15, further comprising allowing a  
2 user to update the tax rule base and the tax knowledge base, wherein updating the  
3 tax rule base and the tax knowledge base provides current data for the method.

1 19. (Currently amended) A computer-readable storage medium storing  
2 instructions that when executed by a computer cause the computer to perform a  
3 method for determining taxes for local jurisdictions, comprising  
4 receiving a request to provide a tax for a transaction from a subscriber;  
5 determining a ~~set of local jurisdictions~~ local jurisdiction for the  
6 transaction;  
7 accessing a tax rule base and a tax knowledge base,

8                   wherein the tax rule base includes one or more tax rules for  
9                   applying taxes in local jurisdictions, and the tax knowledge base includes  
10                  tax data pertaining to tax rates in local jurisdictions, is configured to  
11                  receive tax rules and data in a markup language format or an electronic  
12                  data interchange format, thus enabling a third party provider, a tax  
13                  professional, or an end user to enter the tax rules and data in a machine  
14                  readable format without requiring programming; and  
15                  wherein the tax rules and the tax data comprise at least a country  
16                  name, a tax regime identifier, a tax identifier, a tax type identifier, and a  
17                  tax-jurisdiction identifier tax jurisdiction;  
18                  calculating the tax for ~~each the~~ local jurisdiction in the set of local  
19                  jurisdictions using the one or more tax rules from the tax rule base and the tax rate  
20                  data from the tax knowledge base, wherein calculating the tax involves  
21                  determining an applicable tax corresponding to at least the tax regime and the tax  
22                  jurisdiction at a given level of granularity, a taxable basis for the applicable tax,  
23                  and a tax status for the applicable tax;  
24                  using a third party service external to the system to perform tax  
25                  computations for another local jurisdiction which is simultaneously applicable;  
26                  and  
27                  returning the tax for ~~each the~~ local jurisdiction to the subscriber.

1                  20.       (Original) The computer-readable storage medium of claim 19, the  
2                  method further comprising:  
3                  determining a taxable basis from the transaction;  
4                  determining a tax status basis from the tax rule base;  
5                  determining a tax rate from the tax knowledge base; and  
6                  calculating the tax based on the taxable basis, the tax status basis, and the  
7                  tax rate.

1           21.     (Original) The computer-readable storage medium of claim 19,  
2     wherein receiving the request from the subscriber includes verifying that the  
3     subscriber is authorized to make the request.

1           22.     (Original) The computer-readable storage medium of claim 19, the  
2     method further comprising allowing a user to update the tax rule base and the tax  
3     knowledge base, wherein updating the tax rule base and the tax knowledge base  
4     provides current data for the method.

1           23.     (Currently amended) A means for determining taxes that is  
2     configurable for local jurisdictions, comprising:  
3             a tax knowledge base means for providing tax ~~rate~~ data pertaining to ~~taxes~~  
4     tax rates in local jurisdictions;  
5             a tax rule base means for providing one or more rules for applying taxes in  
6     local jurisdictions,  
7             ~~wherein the tax rule base is configured to receive tax rules and data~~  
8     ~~in a markup language format or an electronic data interchange format, thus~~  
9     ~~enabling a third party provider, a tax professional, or an end user to enter~~  
10    ~~the tax rules and data in a machine readable format without requiring~~  
11    ~~programming; and~~  
12             wherein the tax rules and the tax data comprise ~~at least a country~~  
13    ~~name, a tax regime identifier, a tax identifier, a tax type identifier, and a~~  
14    ~~tax jurisdiction identifier~~ tax jurisdiction;  
15             an external tax service interface means for interfacing to a third party tax  
16    service provider to perform tax computations for another local jurisdiction which  
17    is simultaneously applicable; and

18 a tax determination manager means for determining ~~a tax for a transaction~~  
19 an applicable tax corresponding to at least the tax regime and the tax jurisdiction  
20 at a given level of granularity using the tax knowledge base means and the tax  
21 rule base means.

1 24. (Original) The means of claim 23, further comprising a tax  
2 services request manager means for accessing the tax determination manager  
3 means upon receiving a tax request from a registered subscriber.

1 25. (Original) The means of claim 23, further comprising an open  
2 subscription means that includes security and access protocols used by the tax  
3 services request manager means to control access to the tax determination  
4 manager means.

1 26. (Original) The means of claim 23, further comprising a record  
2 repository means for storing information relating to tax events and tax status.

1 27. (Currently amended) An apparatus that performs operations that  
2 need to be performed to meet the requirements of a local jurisdiction, comprising:  
3 an external tax service interface, embodied in a computer system,  
4 configured to interface to a third party tax service provider to perform tax  
5 computations for another local jurisdiction which is simultaneously applicable  
6 a tax service comprising:  
7 a number of service components within the tax service, including a tax  
8 determination manager and a tax administration manager, wherein the tax  
9 determination manager is configured to determine an applicable tax  
10 corresponding to at least a tax regime and a tax jurisdiction at a given level of  
11 granularity; and



12 a number of utility components within the tax service, including,  
13 a geography model,  
14 a knowledge base which includes tax data pertaining to tax  
15 rates in local jurisdictions, and  
16 a tax rule base which includes one or more tax rules for  
17 applying taxes in the local jurisdictions,  
18 ~~wherein the tax rule base is configured to receive tax rules and data~~  
19 ~~in a markup language format or an electronic data interchange format, thus~~  
20 ~~enabling a third party provider, a tax professional, or an end-user to enter~~  
21 ~~the tax rules and data in a machine-readable format without requiring~~  
22 ~~programming, and~~  
23 wherein the tax rules and the tax data comprise at least the a  
24 country name, a tax regime identifier, a tax identifier, a tax-type identifier,  
25 and a tax-jurisdiction identifier the tax jurisdiction.

1 28. (Previously presented) The apparatus of claim 27, wherein service  
2 components can be broken down into a small number of well-defined processes to  
3 be executed by a tax service in a specific, pre-determined order to fulfill the  
4 requirements imposed by a tax authority of a given local jurisdiction.

1 29. (Previously presented) The apparatus of claim 27, wherein the tax  
2 rule base can accept rules for a given process of a service component to achieve a  
3 requisite result specified by a tax authority of a local jurisdiction.

1 30. (Original) The apparatus of claim 27, further comprising a tax  
2 rules navigator that operates on the tax rule base and returns a result, or a  
3 reference to a result, for a process of a service component for a given local  
4 jurisdiction.